

From: Chang, Kathryn J.
To: [Widick, Marshall](#)
Cc: [Karges, William](#); [Bermudez, Carlos](#); [Perry, Anne Cortina](#); [Barkow, Anthony S.](#)
Subject: RE: request for a Zoom meeting
Date: Friday, May 10, 2024 5:18:50 PM

Marshall,

We write in follow up to our meeting yesterday regarding the status of the UAW's production of electronic documents. We understand the UAW's position to be that the UAW must review any documents before they are electronically produced to us. As we stated during yesterday's conversation, it is our view that such pre-production review will unacceptably delay the production of materials we need in order to properly conduct our investigation. As the UAW knows, the Monitor first provided six document requests relevant to the issues in our investigation in the Monitor's letter dated February 29. We did not receive any documents at all until April 3. Given the delayed and exceedingly modest initial production, in order to help ensure the production of all relevant documents and facilitate our ability to nimbly and expeditiously complete our review, we requested electronic documents by providing a list of search terms and custodians on April 9. Approximately two weeks later, we first discussed those search terms in a call on April 22, during which you stated there were approximately 54,000 hits. Our position, expressed on that call, was that we believed that volume was sufficiently limited for us to obtain, and across which to conduct our searches and review relevant results. We also offered on that call that we would be amenable to receiving the documents in tranches on a rolling basis if easier. Since then, the UAW has yet to make any electronic production of documents to the Monitor. As discussed at the end of our call yesterday, and as discussed similarly on April 22, we are hopeful you will imminently begin to produce to us documents in electronic form, even if those productions are limited to documents responsive to search terms with smaller hit counts.

We have heard the issues you have raised with respect to the burden of producing the volume of materials responsive to our April 9 electronic document requests. In an effort to facilitate the UAW's ability to promptly produce documents, and simultaneously to update to include new search terms and custodians based on our continued investigation (and provide these updates now in the interest of getting that material as soon as possible), we have re-examined the search terms and custodians provided and have included our revisions below. We would expect to see the hit results for these revised requests as soon as possible and that the running of the counts for these search terms will not be used as a justification to further delay the production of documents. And, to be clear, we do not agree that our original set of search terms are overbroad or burdensome. We are narrowing certain of the original search terms solely as an accommodation to facilitate a quick production of materials to us.

At the end of the day, we are indifferent to whether UAW reviews the documents before they are produced to us, afterward, or never. We simply need to receive the requested electronic documents quickly. As we discussed, however, pre-production review by the UAW of all documents responsive to particular search terms with a high hit count before they are produced to us will almost certainly

impede our ability to conduct our investigation in an effective and timely manner. Moreover, as we've said repeatedly, there is no basis to delay the production based on the need to perform a privilege review, for the reasons outlined in our prior emails.

We know that it is your intention to elevate these issues to Bill Karges (who is copied here) so Bill can discuss them directly with Neil, but we wanted to make sure our position is clear and also offer updated search requests which include ways to potentially narrow some of the search terms we previously provided.

Best,
Kathryn

Custodians

1. Margaet Mock
2. Shawn Fain
3. Marni Schroeder
4. Chuck Browning
5. Rich Boyer
6. Mike Booth
7. Kim Geromin
8. Ben Dictor
9. Nathaniel Charny
10. Chris Brooks
11. Thomas Lamadrid
12. Todd Brien
13. Charissa Fields
14. Kris Lundberg
15. Angela Townsel
16. Kelly Tarpey
17. Nicole Current
18. Laura Dickerson
19. LaShawn English
20. Mike Miller
21. Jim McNeill

Date Range

- March 1, 2023 to present

Search Terms

1. "Request for Approval of Travel & Expense Policy Exception"
2. (Delay OR slow OR drag) AND approv*
3. (Deny OR deni*) AND (expense OR money OR pay* OR credit OR fund* OR travel OR park OR gas OR car OR rent* OR cookie OR snack OR pizza OR bagel OR coffee OR takeout OR "take out" OR delivery OR dinner OR lunch OR breakfast OR gas OR

reimburs* OR room OR hotel OR account* OR respons*)

4. "yard sign"
5. "picket sign"
6. "online store"
7. Exception*
8. Retaliat*
9. Punish*
10. Abus* AND (power OR authority OR position OR title OR role OR status OR money OR purse OR fund OR pay OR office OR policy OR discretion OR tone OR language OR attitude OR culture)
11. Intimidate*
12. Harass*
13. Yell*
14. Scream*
15. Aggressive*
16. Threat
17. "quid pro quo"
18. Expense w/10 vote
19. Compliance w/10 report
20. "Special report"
21. (increase* w/5 credit) AND limit
22. Enhanced w/5 card
23. reimburse* w/10 card
24. Remov* w/5 (department OR power OR authority)
25. Bitch OR "F bomb" OR curse OR vulgar OR "f'ing" OR fuck OR pussy OR cunt OR dick OR prick OR effing OR bullshit OR damning
26. Violat* w/10 (policy OR rule OR law OR constitution OR standard)
27. Derogatory
28. Scared
29. Fear
30. Blacklist
31. Exchange AND promise
32. Reassign AND department
33. "Due process"
34. Lack w/5 notice
35. Contentious
36. "cut throat" OR cutthroat OR "slit throat" OR punch OR smack OR kill OR "knock out" OR destroy
37. Banner OR Highlighter

38. (Cussed OR cursed) w/5 out
39. Pushy
40. "blew up"
41. "red flag"
42. Steal AND money
43. "moving expense*"
44. King
45. Queen
46. "thick skin"
47. rumor
48. gossip
49. ambush
50. weaponize*

In addition to any and all documents, including emails, text messages, or instant messages that hit upon the above search terms, we would also like to request any and all emails, text messages, and instant messages sent 1) between any one or more of the following individuals, or 2) between any one of the individuals below and any other UAW personnel, in both cases, from the date range of February 12, 2024 through February 23, 2024.

- Margaret Mock
- Todd Brien
- Jonah Furman
- Shawn Fain
- Marni Schroeder
- Chuck Browning
- Rich Boyer
- Mike Booth
- Kim Geromin
- Ben Dictor
- Nathaniel Charney
- Chris Brooks
- Thomas Lamadrid

From: Widick, Marshall <MWidick@uaw.net>

Sent: Thursday, May 9, 2024 8:36 AM

To: Chang, Kathryn J. <KChang@jenner.com>; Perry, Anne Cortina <APerry@jenner.com>; Barkow, Anthony S. <ABarkow@jenner.com>

Cc: Karges, William <WKarges@uaw.net>; Bermudez, Carlos <CBermudez@uaw.net>

Subject: RE: request for a Zoom meeting

External Email - Do Not Click Links or Attachments Unless You Know They Are Safe

Good morning, Kathryn, Anne, and Tony,

I'll work on getting an updated report, but in the meantime I can share some initial thoughts on narrowing the search terms. I'd suggest that we first explore ways to combine some of the terms which appear duplicative (items 3-5 [deny/ denied/ denial] and items 21-25 [credit card w/5 limit, etc]) and then attach more specificity to the combined terms. For one example: "denied w/5 expense."

Also, I'd like to suggest that whatever we come up with, we ask Mike LaCour to run a new estimated items list. This will show us whether we've been successful in reducing the overall amount of data, and per search term. Depending on Mike's turnaround time, we can schedule another Zoom meeting maybe Monday or Tuesday to review the results.

Thanks, and see you soon,
Marshall

From: Chang, Kathryn J. <KChang@jenner.com>
Sent: Wednesday, May 8, 2024 6:51 PM
To: Widick, Marshall <MWidick@uaw.net>; Perry, Anne Cortina <APerry@jenner.com>; Barkow, Anthony S. <ABarkow@jenner.com>
Cc: Karges, William <WKarges@uaw.net>; Bermudez, Carlos <CBermudez@uaw.net>
Subject: RE: request for a Zoom meeting

Marshall,

In advance of our call tomorrow to discuss e-discovery, could you please provide us with an updated hit report that shows the hits generated for each of the search terms, and the total number of unique hits over all the search terms? In addition, if you would like to propose any alternative search terms, please provide those, along with the associated hit counts, in writing for our review.

We think this information will help facilitate our discussion tomorrow.

Thank you,
Kathryn

From: Chang, Kathryn J.
Sent: Tuesday, May 7, 2024 5:05 PM
To: 'Widick, Marshall' <MWidick@uaw.net>; Perry, Anne Cortina <APerry@jenner.com>; Barkow, Anthony S. <ABarkow@jenner.com>
Cc: Karges, William <WKarges@uaw.net>; Bermudez, Carlos <CBermudez@uaw.net>
Subject: RE: request for a Zoom meeting

Thanks for confirming, will circulate an invite shortly.

Best,
Kathryn

From: Widick, Marshall <MWidick@uaw.net>
Sent: Tuesday, May 7, 2024 5:05 PM
To: Chang, Kathryn J. <KChang@jenner.com>; Perry, Anne Cortina <APerry@jenner.com>; Barkow, Anthony S. <ABarkow@jenner.com>
Cc: Karges, William <WKarges@uaw.net>; Bermudez, Carlos <CBermudez@uaw.net>
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Thanks, Kathryn. 10:30 a.m. works for us.

-Marshall

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From: Chang, Kathryn J. <KChang@jenner.com>
Sent: Tuesday, May 7, 2024 4:53:07 PM
To: Widick, Marshall <MWidick@uaw.net>; Perry, Anne Cortina <APerry@jenner.com>; Barkow, Anthony S. <ABarkow@jenner.com>
Cc: Karges, William <WKarges@uaw.net>; Bermudez, Carlos <CBermudez@uaw.net>
Subject: RE: request for a Zoom meeting

Hi Marshall,

We are available for a call to further discuss on Thursday from 10:30-11:30 ET or 3-4 ET.
Please let us know if any of those times work, and we can circulate a Zoom invite.

Best,
Kathryn

From: Widick, Marshall <MWidick@uaw.net>
Sent: Tuesday, May 7, 2024 4:35 PM

To: Chang, Kathryn J. <KChang@jenner.com>; Perry, Anne Cortina <APerry@jenner.com>; Barkow, Anthony S. <ABarkow@jenner.com>
Cc: Karges, William <WKarges@uaw.net>; Bermudez, Carlos <CBermudez@uaw.net>
Subject: request for a Zoom meeting

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Kathryn, Anne, and Tony,

Carlos Bermudez, deputy general counsel, and I would like to have a Zoom meeting with you, preferably on Thursday, regarding the search terms for your data request of April 9. Although I've been continuing to obtain and produce documents in response to the previous document requests (made on February 29), the data involved in the April 9 requests is even bigger than previously thought – and to our knowledge, bigger than prior data requests by a large margin. The estimate is 119 Gigs, if not greater. Although there was some pushback to our idea of trying to narrow the “propose[d]” search terms in the last Zoom meeting (April 22), we believe that this situation, upon further review, calls for further discussion. Our intent is still to comply and produce requested data; we’re trying to cooperate and collaborate towards narrower sets of terms that effectuate your investigation within the context of a more manageable data structure.

Please advise us if you’re open to this discussion.

Thanks in advance,

Marshall

Marshall J. Widick

Associate General Counsel

International Union, UAW

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Detroit, MI 48214

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